**Country**: **GERMANY**
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**Title:** **COMMERCIAL AVIATION**



## SUMMARY

After contracting dramatically in the early nineties, the German Aerospace market has recovered significantly. Since 1996 the whole market has experienced a 50% increase in sales and 10% increase in employment. The member companies of the German Aerospace Industries Association (BDLI, which represent over 90% of the total industry) took in revenues of more than USD 11 million in 1999 (civil, military aviation and space). The civil sector accounted for the largest portion of this growth – sales rose by over 15 percent to USD 7.9 million.

U.S. companies wanting to do business in Germany have to take into consideration that the aerospace industry is a strongly political industry. A "Buy European" attitude is still visible, although "softening" in the run of the European restructuring process and the resulting need and desire for transatlantic cooperation within the German industry. Thus, U.S. firms should try to get "their foot in the door" at the times of Europeanization of the industry as well as programs and a very positive attitude towards products coming from the United States. U.S. companies will find that German industry is always open to look at their product and evaluate the value for their specific need.

## A. Market Trends and Best Prospects

### 1. Projected figures for the total market

As a whole, the aircraft industry achieved sales of USD 12,142.9 million, and the number of employees was 60,800 in 1999. In 2000,

about 61,000 employees accounted for sales of USD 12,857 million.

The increase was remarkable in the commercial aviation sector with 15.7 % over 1999, 62.4% of total sales. Military aviation contributed 26.1% and space 11.5%. The strong performance in this market was further enhanced by a 20.4% increase in supply/equipment sales, a 17.4% increase in the sale of engines and a 4.8% increase in aerospace materials sales. Total sales in the space sector decreased by 23.3 %.

**German Aerospace Industry Sales Trends (in USD million)**

| | 1999 | 2 |
|---|---|---|
| **Sales in Commercial Aviation** | 7,911.4 | 7,5 |
| **Sales by Manufacturer Groups** | | |
| **Systems Integrators** | 7,061.4 | |
| **Engine Industry** | 2,194.3 | |
| **Equipment Industry** | 3,049.5 | |
| **Materials Industry** | 376.3 | |

Exchange rates used throughout report: 1999 USD 1= DM 1.85
2000 USD 1= DM 2.10

## B. Competitive Situation

### 1. Commercial Aircraft

a. Local Production

The merger of European aerospace industries to EADS (European Aeronautics, Defense and Space Company), the world's 3rd largest aerospace company in 2000 and 2001 has effected not only Europe but also the competition in the United States. Not only the increased competition, but also a growing awareness of the need for cooperation has emerged on both sides of the Atlantic, despite still existing "Buy European" sentiments. While competition appears to be dominating the public and political scenes, an increased trend to cooperation in single projects has become apparent in recent months.

It is a good time for U.S. companies to knock on German doors as German aerospace companies are increasingly looking to the United States to find partners and suppliers.

Germany is one of the most important aerospace markets in the world. It is the location for major European industry activities: Airbus Deutschland GmbH develops and builds roughly one third of the European Airbus. It is a 100% subsidiary of Daimler Chrysler AG. Its aerospace division activities include the development, production and sale of commercial aircraft, helicopters, defense and civil systems, aero engines, military aircraft, satellites and space infrastructure. Other EADS partners are the French Aerospatiale Matra and the Spanish Casa.

EADS holds a 80% stake in Airbus Industrie and, in July 2001, decided together with its UK partner BAE Systems (20%) to combine activities in a single company, Airbus S.A.S. (Societe par Actions Simplifiee). This single corporate entity has been operational since January 1, 2000 and has its headquarters under EADS management in Toulouse.

In 2000, EADS reached sales of USD 26,190 million, a 7.3% increase compared with 1999. In the first half of 2001, sales reached USD 15,555 million, a growth of 20 %. Sales of the company's Airbus Division rose by 17.5% up to USD 16,125 million, 62% of EADS turnover. Placement of orders rose by 50.8% up to USD 53,354

million in 2000, and again Airbus was the major contributor with 68% of all new orders placed. In 1999 EADS had 88,691 employees.

The share of Airbus Industrie, Toulouse, in the world aircraft market amounted to 46 % in 2000 with 520 firm orders worth USD 41,300 million. Airbus employs 44,000 people worldwide, 15,600 in Germany.

Large parts of the fuselage rudder assembly come from Germany. All interiors of Airbus aircraft apart from the A330 and the A340 are equipped in the Hamburg facilities. For the widebodies A300 and A310 as well as the long-range versions A330 and A340, the integration of the wings is carried out in Bremen.

Milestones of the year were the production of the newest A340 and final assembly of the first three A340-600s, which will be delivered in 2002.

The A380 (formerly called A3XX) is the largest passenger jet ever built and is supposed to further strengthen the company's position in the market. It was launched on December 19, 2000, and offers space for 555 passengers and has a range of km 14,600. So far, 48 firm orders have been placed. Costs of the A380 development are estimated at USD 12,000 million and the production will create15,000 jobs in Germany.

The industrial concept of "centers of competence" around Europe was retained for the A380 aircraft. Complete aircraft sections will be delivered to Toulouse, France, for assembly. Then, the aircraft will fly to Hamburg, Germany, for cabin furnishing, systems installation, customization and painting.

Hamburg, Germany's largest Airbus facility, is also the final assembly line for the A318, A319 and A321. Production rates for the A320 family are being steadily ramped up, from a current 23 aircraft per month, to 30 per month by 2003. Furthermore, Hamburg is responsible for the production and equipping of fuselage sections and static and dynamic testing.

Other sites are a composite technology center in Stade and a site in

Bremen equipping and assembling the A300/A310 and A300/A340 wings and manufacturing all small metal parts.

Germany is also home to Dornier Luftfahrt GmbH, whose parent is the German-American Fairchild Aerospace Group. Industrial management was taken over by Fairchild (based in San Antonio) in June 1996. Since 2000, EADS has been holding 58.4% of the Dornier Group. The company underwent structural and strategic realignment and is now well positioned on the U.S. and German market.

Dornier Luftfahrt GmbH, based in Oberpaffenhofen, is manufacturer of the 30- to 40- seat regional 328JET, which was certified by the Joint Aviation Authorities (JAA) and the US-FAA in July, 1999. This jet is powered by two Pratt & Whitney PWC 206B turbofans. The company also developed the 428Jet but ceased producing it in 2000 due to changed market conditions.

It also manufactures the low wing monoplane 528Jet (55-63 seats)/728JET(55-100 seats)/928JET (95-105 seats) family. The 70-seat-class 728JET and 90-seat-class 928JET are powered by GE CF-34 engines and feature the Honeywell Primus Epic avionics system. The 728JET, launched in May, 1998 at the International Aerospace Exhibition (ILA) in Berlin, will be certified in early 2002 and shortly afterwards delivered to its first customer, Lufthansa CityLine.

Fairchild Dornier has orders from General Electric Capital Aviation Services for 50 728JETs and options for 100. Furthermore, Fairchild Dornier announced aircraft orders for airliners and corporate jets worth more than $ 297 million at the 44th Paris Air Show in June 2001, bringing the company's total order book to 543 aircraft valued at more than $12,000 million.

b. Import Market

As the aerospace industry is a strategic industry with a very high and significant political impact, the import market is not driven by demand only. Even if a certain product is needed and this specific need cannot

be met by German suppliers, end-users might still not source the product in the United States.

This aspect may cause U.S. exporters difficulties when trying to enter the market. It appears to be advisable for U.S. suppliers to either team up with U.S. companies that are already in business in Germany or with a German supplier to larger companies, becoming a sub-supplier of that firm.

c. Imports from the United States

EADS contributes more than $ 4,000 million annually to the U.S. economy through its suppliers and subsidiaries, the latter including: Aeroframe Services, Airbus Industrie of North America, Inc., American Eurocopter Corporation, Astrium North America, ATR Marketing and Support, Inc., Barfield, Inc., EADS CASA Aircraft USA, Inc., Cilas U.S., Inc., Fairchild Controls Corporation, Intecom, ISTAR Americas Inc., Matra Datavision, Inc., MATRAnet, Inc., Socata Aircraft (EADS press release 17.August 2001).

The involvement of U.S. suppliers in European aerospace projects include the following:

- ♦ Aerostructures Corp. of Nashville supplies one of the largest single items for an Airbus aircraft – 70-foot-long wing skin panels for the A330 and A340
- ♦ Aircruisers of Belmar, New Jersey created the Mae West life-jacket and invented the first evacuation slide over 30 years ago
- ♦ General Electric in Cincinnati is one of the world's leading engine builders and its engines powered the first A300. Since then, GE has joined with SNECMA to produce the CFM engines for the A320 and A340
- ♦ Honeywell in Florida provides guidance systems for all Airbus aircraft, anything from GPS to ground proximity radar
- ♦ MCGill in Los Angeles is the largest producer of baggage compartment liners in the world and the second largest producer of composite flooring. Both are used by Airbus
- ♦ Pratt & Whitney of Connecticut provides over $500 million worth of jet engines to Airbus every year

Thirty percent of EADS products are purchased directly from the United States or U.S. based suppliers. Direct purchases in 2000 amounted to more than USD 5,000 million. In April 2001, the company opened its U.S. corporate office in Washington, D.C.. It also has several subsidiaries in the United States and employs more than 1,500.

**2. Aero engines**

Local production

Rolls Royce is Germany's major engine manufacturer. In 1990 the company decided to form a joint venture with BMW of Germany, but Rolls-Royce took full control of the joint venture starting January 2000, the legal name now being Rolls-Royce Deutschland & Co Ltd. KG. Rolls-Royce manufactures a turbofan range for the civil aerospace: the three-shaft Trent family including Trent 500, 700, 800 (Trent 800 is now the market leading engine on the Boeing 777 with a 44 per cent share) and the new 600 and 900. These are used for wide-body aircraft, just as the RB211-524, and they compete in a market for over 19,300 engines valued USD 173,000 million. Rolls Royce also manufactures engines for narrow-body aircrafts such as Boeing 757, Boeing 717 and Airbus A320 which are powered by the RB211-535, the BR715 and the V2500 family of engines respectively. The market to power new deliveries of major narrow-body aircraft will require 24,300 engines worth $ 109,000 million. Rolls is also bidding with the Trent 900 for the Airbus A380.

The second largest manufacturer is MTU Aero Engines. The company's headquarters and also its largest operation and entire development effort are located in Munich with some 5,500 employees. MTU Aero Engines in 1999 launched a development and engineering site in the United States, Rocky Hill, near the headquarters of its major strategic partner Pratt & Whitney. The MTU Aero Engine Design (AED) offers development capacities, specifically for further developments of the PW2000 and PW4000 and for new

joint programs with Pratt, such as the PW6000. The MTU Aero Engine Design is a wholly owned subsidiary of MTU Aero Engines. In March 2001, MTU Aero Engines took over the U.S. firm Caval, based in Newington near Hardfort, CT, from Chromalloy. This newest subsidiary of MTU Aero Engines, MTU Engine Components (AEC), has approximately 180 employees and is mainly involved in the production of turbine discs for various engine programs. Main clients are General Electric and Pratt & Whitney. MTU also holds 12.5% of the IAE consortium. The five-nation International Aero Engines, registered in Zurich, Switzerland, is headquartered in East Hartford, Connecticut. IAE manages and coordinates the V2500 engine program. The V2500 is an engine choice on the Airbus A320 transport family. The company is staffed mainly with personnel from the participating partners Pratt & Whitney, Rolls Royce, JAEC (Japan) and MTU.

**c. Equipment and other parts**

Local production

Major German companies in this field are Liebherr-Aerospace Lindenberg, ASG, Drägerwerk, LITEF, Diehl Avionik Systeme, Aerodata, Rohde & Schwarz, Dornier GmbH, Hella Aerospace, only to name a few important ones. A detailed list with names and contact information can be obtained from the U.S. Commercial Service in Berlin, Germany. (Contact information please see below.

The equipment industry is facing an array of new challenges arising from the globalization of business, the rapid pace of technological change and developments within the supply chain. The world wide restructuring of the aerospace industry will have a major impact on the industry.

The first level companies increasingly concentrate on conceptual design, marketing, production management, on assembly and product support. At the same time that system integrators are forced to farm out a wide variety of tasks to suppliers on all levels. This process is being accelerated by intensified competition, shorter product life

cycles and the need to guarantee consistently high quality.
This changing environment means that the relationship between primes and suppliers will be fundamentally transformed along the lines of a "partnership supply chain" in which responsibility is divided but risk is shared. An equipment manufacturer can only become a "preferred supplier" if it is capable of shouldering the financial and technical efforts involved.

To survive this world-wide competition, with low wage competitors on the other side of the globe, aerospace equipment industry has to cooperate and build up a strategic advantage. This necessary cooperation is no longer limited by national borders, but is increasingly getting a cross border and Transatlantic dimension.

Here lie the chances for U.S. companies wanting to cooperate or partner with German equipment manufacturers.

Liebherr Aerospace, to name one example, acts on a global basis and has companies in France, Canada, Singapore, China and 4 sites in the USA.

LITEF in Freiburg was founded by Litton Industries, Inc. in 1961. In February 1996, Litton Industries acquired TELDIX GmbH in Heidelberg. The products of LITEF and TELDIX were complementary and "Centers of Excellence" were established: Airborne, marine and land vehicle navigation systems are handled at the LITEF facilities in Freiburg; computers, displays and space products at the production site of TELDIX in Heidelberg.

In April 2001, Northrop Grumman Corporation, Los Angeles acquired Litton Industries. TELDIX and LITEF now belong to the Navigation Systems Division within Northrop Grumman's Electronic Sensors and Systems Sector.

The above examples underline that in the course of globalization of the industry international cooperation of any kind is necessary and new opportunities for U.S. auppliers may open up.

Diehl Avionik Systeme Deutschland GmbH, now Germany's largest

avionics supplier is a new company launched in September 2000 and formed jointly by Diehl VA Systeme Stiftung & Co. KG and Thomson-CSF (now named Thales) Sextant. This cooperation emphasizes the ongoing consolidation within the avionics industry, and signifies a European counterpoint to the merger of Honeywell and AlliedSignal in the United States in 2000.

The new company, owned 51% by Diehl VA Systeme Stiftung and 49% by Thomson-CSF Sextant, employs more than 800 people and is expected to take in about USD100 million annually. Diehl Avionik Systeme's capital stock totals USD 6.38 million. Diehl Avionik Systeme is based in Uberlingen, with facilities in Frankfurt and offices in Toulouse. To form the company, Diehl VA Systeme Stiftung transferred the activities of two of its divisions: BGT and VDO Luftfahrtgerate Werk GmbH.

Diehl Avionik will provide a wide array of avionics equipment, including head-up and panel-mounted display systems, flight control systems, processing equipment, engine and auxiliary power unit control systems, instruments and sensors.

**d. Materials industry**

Local Production

Major German companies in the materials industry are TITAL, Bayern-Chemie, Thyssen Umformtechnik, MAN Technologie, Deutsche Titan, OTTO FUCHS, Leistritz, ESW, GKN Aerospace, KRUPP VDM, Rolls-Royce Deutschland, Fairchild Dornier, MTU, Honsel.

The availability of modern materials and manufacturing techniques is increasingly determining the performance limits and economic viability of new aircraft. Materials research and application represent indispensable key technologies in all leading industrial nations. Analysts are predicting a growth rate of 10 % for high-performance materials worldwide. The materials-based market for semi-finished products in 2000 is estimated to be worth USD 71,428.6 million.

## C. End-User Analysis

a. Airlines

End-users of the whole product aircraft are the major German airlines as, for example there are Deutsche Lufthansa AG. For the 4th year in a row it has been the most successful airline in Europe. The turnover of Lufthansa Group increased by 18.8% to USD 16,450.2 million in 2000. Forty seven million travelers flew with Lufthansa German Airlines, which was an increase of 7.4% compared to the previous year. Out of those, 41.3 million were passengers of Deutsche Lufthansa AG and 5.7 million passengers of Lufthansa CityLine GmbH, a wholly owned subsidiary since 1993. Employees amount to more than 32,000, of which 30,337 are from Lufthansa German Airlines and 1,903 from Lufthansa CityLine GmbH. Headquarters of Lufthansa AG are in Cologne.

Lufthansa operates a total fleet of 331 aircraft, which consists of 131 Boeing aircraft, 130 Airbus, 41 Canadair Regionaljets, 11 Fokker 50 and finally, 18 AvroRJ85 Jets.

In size, they range from Boeing 747-400 jumbos seating more than 400 passengers, the long-haul Airbus A340 (about 220 seats) and the short-haul A319 (about 120 seats), right down to the 50-seater Canadair Jet. Lufthansa is equipped with 234 jets and Lufthansa CityLine with a total of 56 Canadair and Avro RJ85 aircraft.

Lufthansa Cargo runs a fleet of eight Boeing 747 and twelve Boeing MD-11 freighters. All Airbus models are in use except for A318, A330 and A380. Lufthansa is the largest customer for Airbus A340 worldwide. Scheduled to join the Group fleet by 2006 are another 52 aircraft. They include 8 Airbus A340-300 and ten newly developed Airbus A340-600s as well as 3 Boeing 747-400 (plus 4 options).

Lufthansa Cityline has ordered 60 Fairchild-Dornier 728 jets currently

under development by the German-American manufacturer at Oberpfaffenhofen near Munich. The first jets of this type will be delivered in 2003. Lufthansa CityLine is the launch customer for the 728JET with its order of 60 728JET airliners and options for 60 additional aircraft.

Germany's second largest carrier is the Deutsche BA. It carried more than 3 million passengers since 1998 and serves 11 destinations in total, 7 of which are in Germany. In the last business year sales amounted to USD 371.5 million, a 5.7 % increase to the previous results. Deutsche BA employs more than 800 people.

Its head office and principal operating hub is Munich, which is being expanded. Second most important airport is Berlin-Tegel followed by the Koeln/Bonn airport also gaining in importance.

The fleet is one of the youngest with 1.5 years old planes on average; it consists of 16 Boeing 737-300, 11 of which have 136 seats and 5 have 130 seats. The Deutsche BA has code-share partners, British Airways and U.S. Airways only to name two of them.

b. The Aircraft manufacturers

Major end user of U.S. aircaft parts and materials are the two large aircraft manufacturers. Quality and price as well as fast and sufficient services are the most important criteria to become supplier for the both the Airbus facilities in Hamburg as well as Dornier in Oberpfaffenhofen.

## D. Market Access

1. Federal agencies to regulate aviation

The Ministry of Transportation ( Bundesministerium für Verkehr, Bau und Wohnungswesen) is the major regulating organization with regard to aviation affairs in Germany. Its subdivision concerned with aviation (Abteilung LS für Luft- und Raumfahrt, Schiffahrt) is

responsible for air-traffic and airport issues, air-traffic security and environmentally friendly aircraft and traffic.

The Luftfahrt-Bundesamt is the authority carrying out activities for the Ministry of Transportation in all aviation questions. Certification of equipment and airworthiness as well as personnel are this agency's responsibility.

The supervision of aviation as well as procurement of air traffic control equipment lies with the Deutsche Flugsicherung, privatized in 1993

Security and safety of German airports are handled in the Federal Ministry of the Interior (Bundesinnenministerium, Referat BGS II 2 "Angelegenheiten der Grenzsicherung, der Luftsicherheit und der Bahnpolizei"). Tenders for the procurement of airport security equipment are responsibility of the procurement office of the Ministry of the Interior.

The Ministry of Economics was – in the 80s, when the aerospace industry still needed government fiscal subsidies – responsible for all subsidy programs for aerospace companies. As the industry has been totally privatized, subsidies have been cut substantially. One crucial position located within the Federal Ministry of Economics is the German Government Aerospace Coordinator and Parliamentary Undersecretary at the Ministry of Economics and Technology. Appointed by the federal government in charge, it is the coordinator's responsibility to set the government's goals in aviation affairs and coordinate supportive programs and financial help for the aviation industry. He therefore takes on the role of a mediator between the interests of the industry on the one hand and politics on the other and acts as representative of German interests on international platforms.

## 2. The Civil Aeronautics Research Program

To strengthen Germany's position as a technologically advanced country, the German Federal Government runs the Civil Aeronautics

Research Program to give German companies in the aerospace field subsidiaries.

Successful technological developments made during the first program from 1995-98 are being continued in a second, 1999 to 2002 program (LuFo II). The latter focuses on the A380-Megaliner aircaft, efficient and environmentally friendly engines, and all-weather noise reduced helicopters.

Industry projects can receive a 40% governmental support and other projects such as university research can claim up to 50%. The governmental budget for the Civil Aeronautics Research Program is decreasing from $18 million in 2000 to $10.6 million in 2002, but the program will be continued according to plan. Only the financial contribution to the development costs of the A380 will not be provided for anymore from 2002 on in the framework of the Federal government's support.

## 3. Procurement methods

Procurement is handled in free competition differently in each company. As soon as a public authority is involved – which is the case if an airport is owned by the government and the federal states – a public tender has to be held according to German public procurement law (Vergaberecht).

There are three different kinds of invitations to tender: a public procedure, a limited procedure or negotiations. German procurement law regulates the procedure to be taken for the placing of public orders as well as their examination by a competent authority. After a reform of the public procurement law and the translation of EC guidelines, a new version of the decree came into force in February 2001. If you need further information on the German tendering law, contact the U.S. Commercial Service in Berlin. (For contact information, please see below)

## 4. Trade shows

Germany is home to the International Aerospace Exhibition (ILA) at the Berlin-Schönefeld airport, which is held biennially. In 2000 941 exhibitors from 38 countries participated, 316 aircraft (of which 50 helicopters) were on display and parallel to the show more than 60 events covering a wide range of specialist conventions and conferences were organized. For the first time three days were exclusively reserved for trade visitors and four open to public.

212,000 visitors of whom 84,000 trade visitors. The International profile of the event was raised with the location Berlin which now is home to the German Parliament and the Government. Over 160 delegations from more than 70 countries paid and official visit to the ILA. The ILA helped to secure contracts and options to the tune of more than DM50 billion. Example of contracts: orders/options for Fairchild Dornier ($ 11,428.6 million) and Embraer ($ 3,428.6 million)

ILA 2002 will be held from May 6-12, 2002, and will be opened by Federal Chancellor Schroeder.

Another trade show, AERO, has been certified by the U.S. Department of Commerce three times up to now. The Friedrichshafen-based show is geared toward general and business aviation. The most recent event, in April 2001, attracted a record 480 exhibitors from 28 countries, and 40,000 visitors, a quarter of which from abroad. The spectrum of products displayed ranged from business jets, gliders and ultra-light aircraft to onboard electronics, maintenance and accessories. The next AERO will take place from April 24-27, 2003.

If American companies wish to meet major German aerospace companies, they should also attend the two important European trade shows, Le Bourget in France, and Farnborough in England. The last aerospace trade show in Le Bourget, which is the largest of its kind in the world, took place in June 2001. Further information can be obtained through the show organizer:

S.I.A.E.
4, rue Galilee

75116 Paris
tel: +33-1-53 23 33 33
fax: +33-1-47 20 00 86
http://www.paris-air-show.com

The next Farnborough Airshow will be held in July 2002 (July 22-28). Contact is:

SBAC Duxbury House
60 Petty France
London, Victoria
SW1H 9EU
tel: +44-171-227 1000
fax: +44-171-227 1067
http://www.farnborough.com

5. Contact at the U.S. Embassy Berlin, Germany

If you need further information on any of the topics that you found in the report above, please contact the U.S. Commercial Service at the American Embassy in Berlin:

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ISA Customer Satisfaction Survey

U.S. Department of Commerce
International Trade Administration
The Commercial Service
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1. Country covered by report: _____

Industry/title: _____

Commerce domestic office that assisted you (if applicable):

2. How did you find out about the ISA service?
__Direct mail

__Recommended by another firm
__Recommended by Commerce staff
__Trade/state/private newsletter
__Department of Commerce newsletter
__Other (specify): _____

3. Please indicate the extent to which your objectives were satisfied:
1-Very satisfied
2-Satisfied
3-Neither satisfied nor dissatisfied
4-Dissatisfied
5-Very dissatisfied
6-Not applicable

__Overall objectives
__Accuracy of information
__Completeness of information
__Clarity of information
__Relevance of information
__Follow-up by Commerce representative

4. In your opinion, did using the ISA service facilitate any of the following?
__Decided to enter or increase presence in market
__Developed an export marketing plan
__Added to knowledge of country/industry
__Corroborated market data from other sources
__Decided to bypass or reduce presence in market
__Other (specify): _____

5. How likely would you be to use the ISA service again?
__Definitely would
__Probably would
__Unsure
__Probably would not
__Definitely would not

6. Comments:

_____

* * * About Your Firm * * *

1. Number of employees: __1-99 __100-249 __250-499
__500-999 __1,000+

2. Location (abbreviation of your state only):_____

3. Business activity (check one):
__Manufacturing
__Service
__Agent, broker, manufacturer's representative
__Export management or trading company
__Other (specify):_____

4. Value of export shipments over the past 12 months:

__Less than $10K
__$11K-$100K
__$101K-$500K
__$501K-$999K
__$$1M-$5M
__More than $5M

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